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RADIO FACTS

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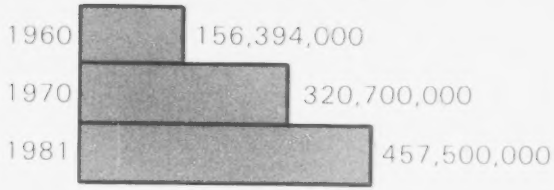
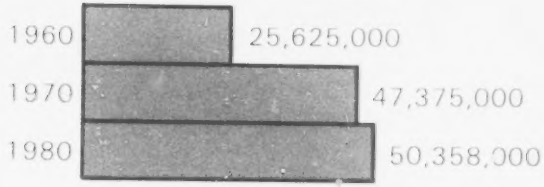
1.
457.5 MILLION RADIOS IN U.S.; SOME 50 MILLION SOLD ANNUALLY

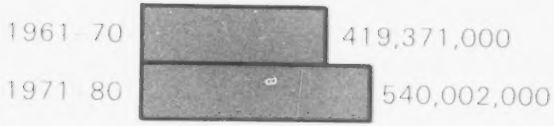
SETS IN USE UP 193%



ANNUAL SET SALES UP 97%

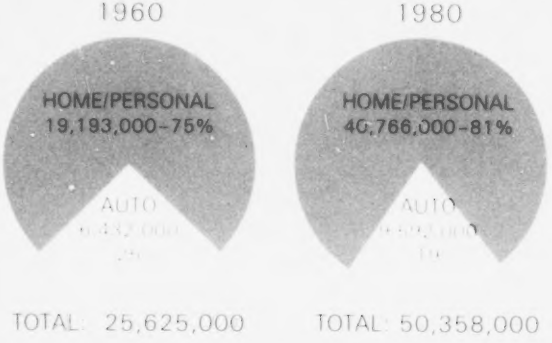


TEN-YEAR SET SALES UP 29%



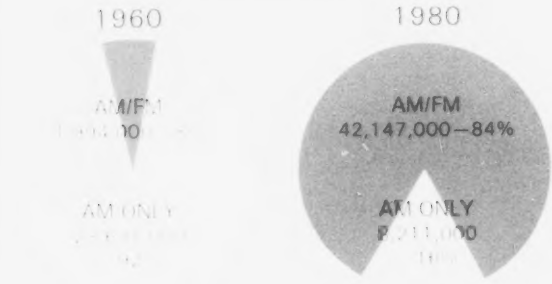
Consumers spent **$2,923,000,000**
on radio sets in 1980

TOTAL RADIO SET SALES MIX



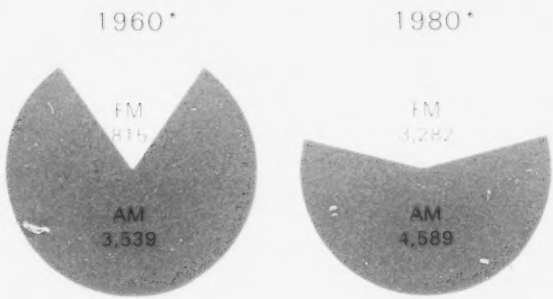
TOTAL: 25,625,000 TOTAL: 50,358,000

AM-FM SET SALES MIX



TOTAL: 25,625,000 TOTAL: 50,358,000

COMMERCIAL STATIONS ON THE AIR

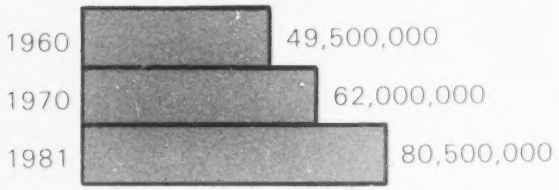


TOTAL: 4,354 TOTAL: 7,871

* Year-end

2.
99% OF HOMES WITH RADIOS

RADIO HOUSEHOLDS UP 63%

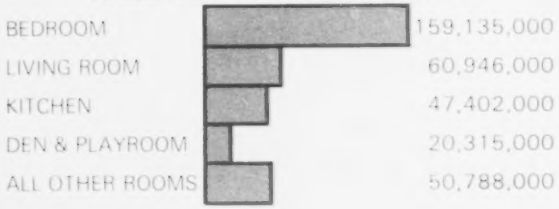


VIRTUALLY EVERY HOME HAS A RADIO
ONLY 1% OF HOMES
WITH NO RADIO

99% of all U.S. homes have at least one working order Radio. Average household has **5.5** sets.

77% OF PERSONS HAVE 4 OR MORE RADIO SETS IN THEIR HOUSEHOLD.

WHERE HOME RADIOS ARE LOCATED



BATTERY SET SALES 1980

17,234,000

70% of 1980 sales were FM or AM/FM combinations

BATTERY SET SALES

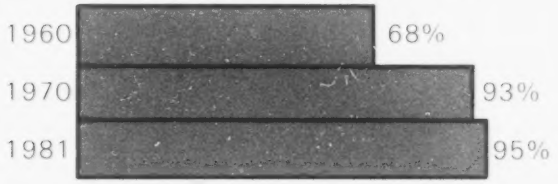
TOTAL: 25,625,000 TOTAL: 50,358,000

3.
95% OF CARS RADIO EQUIPPED; CAR RADIO REACHES 70% WEEKLY

RADIO SETS IN AUTOS UP 182%

98% of company-owned cars are radio equipped.
99% of used cars are sold with radios.

PERCENT OF CARS WITH RADIOS:
AUTO RADIO NEAR SATURATION POINT



AUTO RADIO: BASIC TO U.S. LIFE

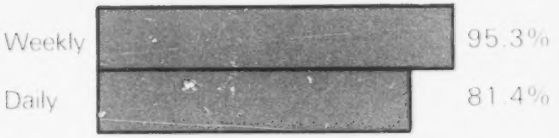
86% of commuters get to work by auto.
90% of shopping visits are made by auto.
84% of intercity travel is by auto.

Auto Radio reaches **7** out of **10** adults within the course of a week.

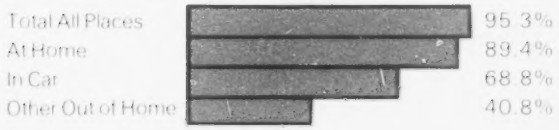
4.

RADIO REACHES 81% IN A DAY; 95% IN A WEEK

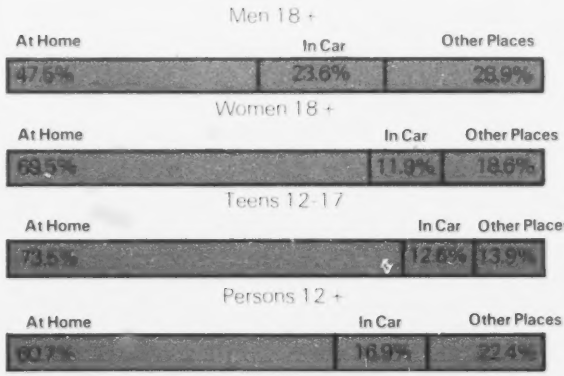
RADIO'S CUMULATIVE AUDIENCE REACH
Persons 12+



RADIO'S WEEKLY CUMULATIVE AUDIENCE BY PLACE OF LISTENING
Persons 12+



RADIO AUDIENCE BY PLACE OF LISTENING

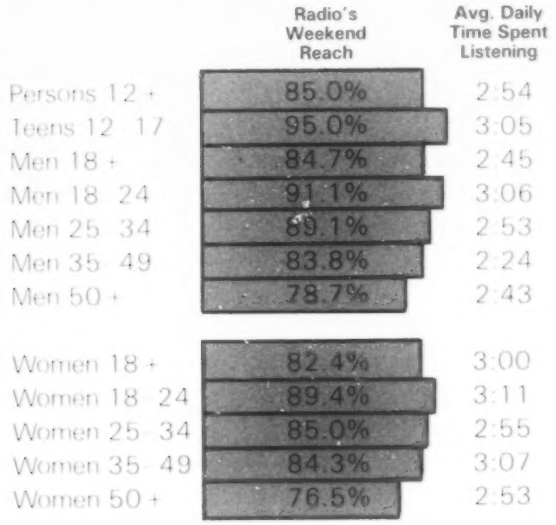


RADIO'S CUMULATIVE AUDIENCE AMONG A RANGE OF DEMOGRAPHIC GROUPS

	Avg. Daily Cume	Weekly Cume Mon.–Sun.	Avg. Daily Time Spent Listening
Persons 12+	81.4%	95.3%	3:24
Teens 12–17	91.1%	99.9%	3:01
Men			
18+	81.9%	95.8%	3:26
18–24	88.7	99.9	3:58
25–34	86.7	99.0	3:49
35–49	83.0	97.2	3:18
50+	74.2	90.4	2:59
Household income			
$25,000+	86.4%	99.8%	3:28
$20,000–24,999	85.3	98.1	3:42
$15,000–19,999	85.2	97.7	3:45
Under $15,000	73.5	89.1	3:07
College-educated	85.8%	97.8%	3:22
Women			
18+	78.2%	93.6%	3:28
18–24	87.1	98.7	3:47
25–34	81.8	97.0	3:36
35–49	80.2	96.1	3:41
50+	70.7	87.8	3:06
Household income			
$25,000+	85.1%	99.9%	3:39
$20,000–24,999	81.3	96.0	3:34
$15,000–19,999	81.1	95.0	3:42
Under $15,000	71.6	88.1	3:14
College-educated	82.6%	96.5%	3:32
Adults In Households of			
5+ persons	83.0%	96.7%	3:38
3–4 persons	81.5	96.1	3:32
1–2 persons	76.9	92.2	3:17

5.
WEEKEND LISTENING: 3 HOURS PER DAY

REACHES ALMOST 9 OUT OF 10 ON WEEKEND



LISTENING CONSISTENT BY SEASON

Sat.-Sun., 6 AM-Midnight
Persons 12+ Cume

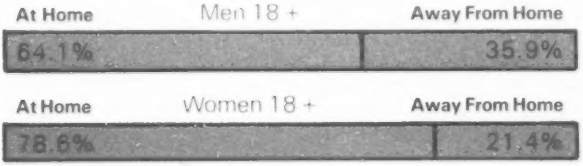
6.
RADIO 7 PM TO MIDNIGHT: CONSUMERS IN AND OUT OF HOME

	Weekly Reach Mon.–Sun. 7 PM–Midnight	Weekly Time Spent Among Listeners
Persons 12 +	70.8%	3:50
Teens 12–17	92.8%	5:45
Men 18 +	69.2%	3:42
Men 18–34	82.6%	4:56
Men 25–54	72.1%	3:22
Women 18 +	66.1%	3:25
Women 18–34	80.6%	4:04
Women 25–54	69.8%	3:18

Adults who listen between 7 PM and Midnight spend more time with nighttime Radio in a week, than the average person spends reading all magazines. And listening time is close to all newspaper reading time throughout the week.

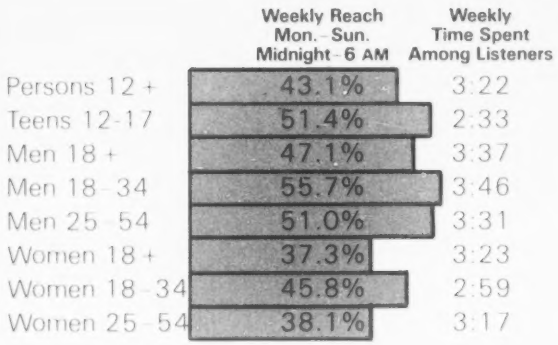
NIGHTTIME RADIO REACHES PEOPLE IN CARS, OUT OF DOORS, AS WELL AS IN THE HOME

Share of Radio's Audience—Monday–Sunday, 7 PM–Midnight



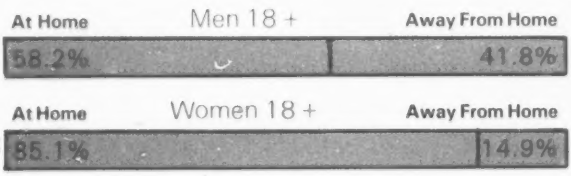
7.

POST-MIDNIGHT RADIO LISTENERS AVERAGE 3 HOURS 22 MINUTES WEEKLY WITH RADIO



THEY LISTEN IN HOME, IN CARS, IN PUBLIC PLACES AND AT WORK BECAUSE OF RADIO'S AVAILABILITY

Share of Radio's Audience—Monday–Sunday, Midnight–6 AM



8.

SUMMER RADIO GOES WITH ACTIVE LIFESTYLES

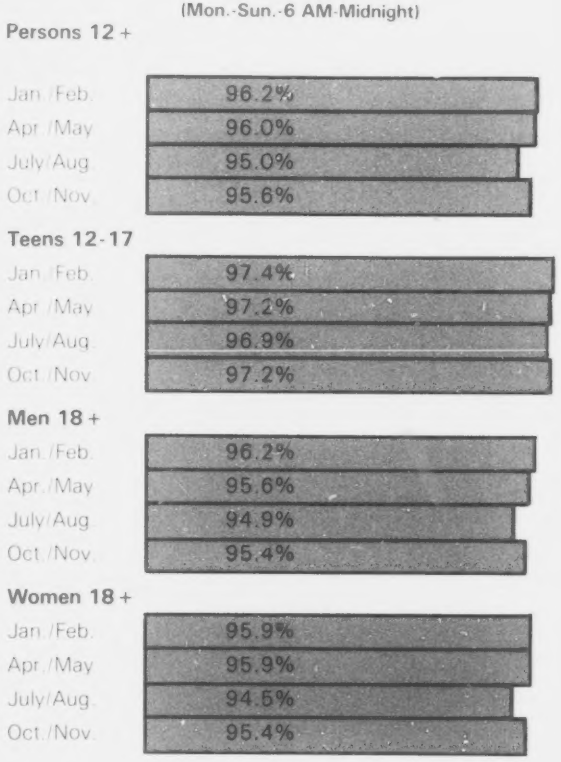
	Weekly Reach Mon.-Sun. 6 AM-Midnight	Avg. Daily Time Spent Listening
Persons 12+	95.2%	3:00
Men 18+	95.0%	3:00
Men 18-24	95.5%	3:17
Men 25-34	96.7%	3:03
Men 35-44	94.3%	2:53
Men 45-54	94.9%	2:46
Men 55-64	95.1%	3:04
Women 18+	95.0%	3:08
Women 18-24	96.7%	3:23
Women 25-34	96.5%	2:57
Women 35-44	95.4%	2:58
Women 45-54	94.9%	3:06
Women 55-64	95.3%	3:21
Teens 12-17	96.6%	2:36

SUMMER LISTENING BY LOCATION
(Persons 12+, Mon.-Fri.)

	In-Home	Out of Home
6 AM-Midnight	59.8%	40.2%
6-10 AM/3-7 PM	60.8%	39.2%
10 AM-3 PM	49.5%	50.5%
7 PM-Midnight	76.9%	23.1%

9.
IN EVERY SEASON: HIGH WEEKLY REACH

Television's average daily audience declines 11% in Summer compared to the annual average. But Radio delivers the same high percentage of listeners every week, in every season.



10.
RADIO IS MAJOR U.S. NEWS SOURCE

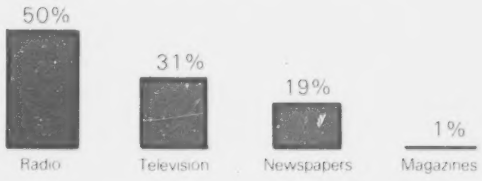
RADIO DELIVERS THE NEWS FIRST IN THE MORNING

	All Adults 18+	Business Executives	College Educated	Upper Income
Radio	52%	49%	52%	56%
Tv	20%	8%	16%	16%
Newspapers	21%	42%	28%	25%
All others	7%	1%	4%	3%

*PRIMARY DAYTIME NEWS SOURCE

	All Adults	Upper Income
Radio	46%	52%
Tv	39%	33%
Newspapers	34%	39%
Other People	8%	10%
Magazines	2%	3%

*RADIO TOPS OTHER MAJOR MEDIA AS FIRST NEWS SOURCE REGULARLY

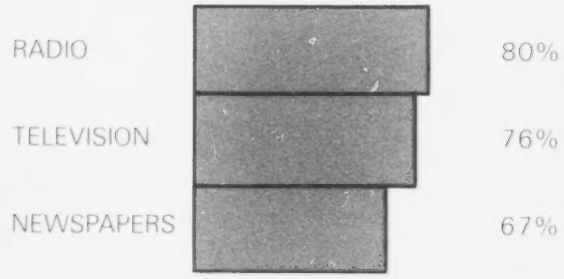


* Adds to more than 100% due to multiple mentions

11.
RADIO REACHES MORE ADULTS THAN TV OR NEWSPAPERS IN A DAY OR WEEK

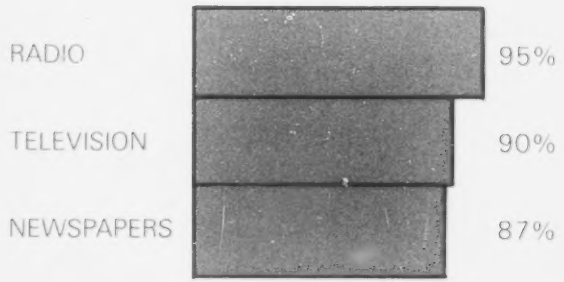
RADIO LEADS OTHER DAILY MEDIA IN DAILY REACH

Adults 18+



RADIO LEADS OTHER DAILY MEDIA IN WEEKLY REACH

Adults 18+

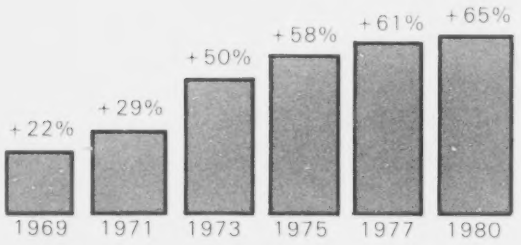


12.
RADIO'S AUDIENCE UP 65% SINCE '67

RADIO'S AUDIENCE GROWTH UP 65%
(1967–1980)
Persons 12+ Using Radio in Average Quarter Hour
6 AM–Midnight–Monday–Sunday

	Number	Index
1967	19,126,000	100
1969	23,321,000	122
1971	24,709,000	129
1973	28,741,000	150
1975	30,266,000	158
1977	30,849,000	161
1980	31,496,000	165

PERCENT AUDIENCE GROWTH SINCE 1967



Explanation

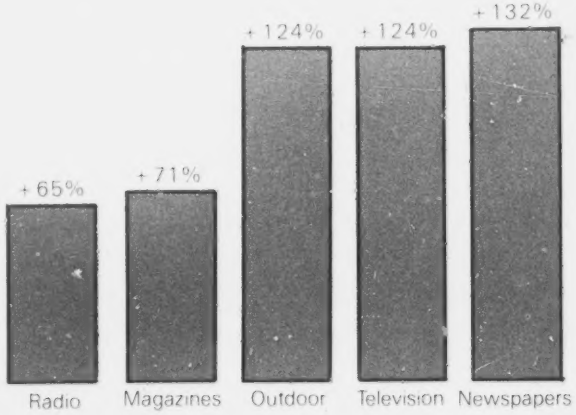
Radio's growth trend is compiled from Radio's All Dimension Audience Research (RADAR) reports which measure Radio listening over a weekly period for the entire country. The basic method employed consists of daily telephone interviews with a sampled person over a 7 day period. For the period 1967–1971, RADAR was conducted by Brand Ratings Research Inc. Since that time RADAR reports have been conducted by Statistical Research, Inc.

13.
RADIO'S C-P-M UP LEAST OF ALL MEDIA SINCE '67

RADIO'S COST-PER-THOUSAND UP LEAST
(1967 - 1980)
Cost-Per-Thousand Indices

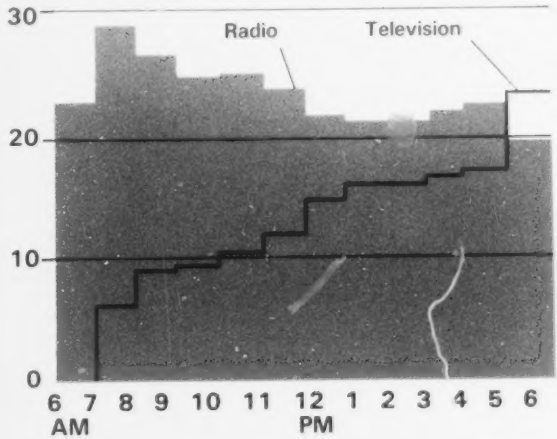
	Radio	Maga-zines	Out-door	Tv	News-papers
1967	100	100	100	100	100
1969	100	105	106	107	109
1971	96	112	119	96	118
1973	105	109	136	112	126
1975	112	120	151	123	154
1977	131	133	174	167	183
1980	165	171	224	224	232

COST-PER-THOUSAND INCREASE
(1967 - 1980)

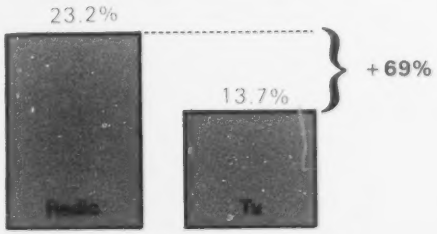


14.
RADIO-TV COMPARISONS

RADIO LEADS TV THROUGH DAYTIME
Adults 18+, Monday-Friday



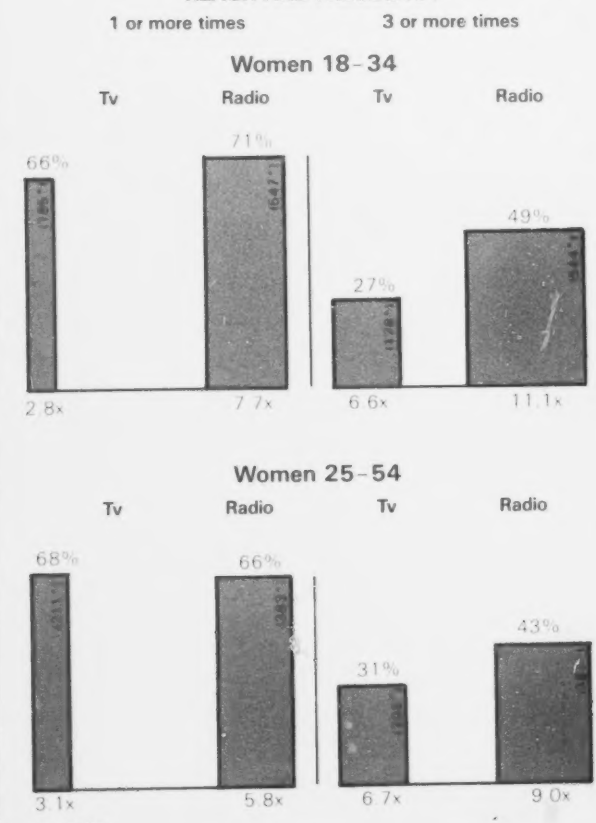
AVERAGE DAYTIME RATING:
RADIO 69% AHEAD OF TV
Adults 18+, Monday-Friday



Radio: Average ½ hour (6 AM - 6 PM). Tv: Average ½ hour (7 AM - 6 PM)

RADIO DELIVERS MORE EFFECTIVE FREQUENCY THAN TV AT EQUAL BUDGETS

Most media authorities agree that "at least three exposures within a purchase cycle" constitute effective exposure.

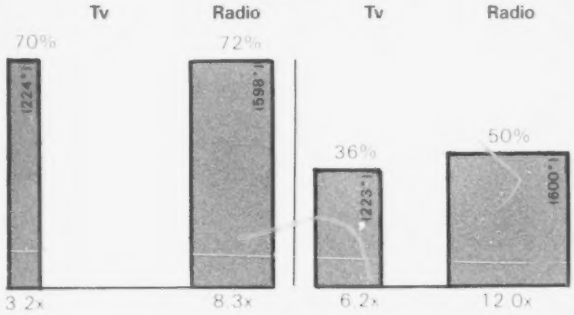


* GRP's

REACH AND FREQUENCY

1 or more times | 3 or more times

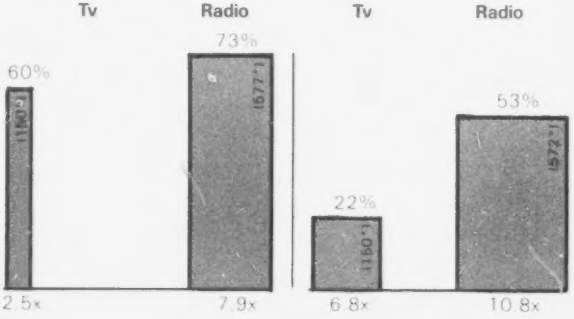
Teens 12-17



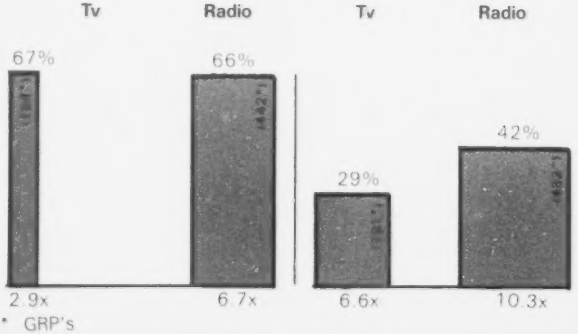
REACH AND FREQUENCY

1 or more times | 3 or more times

Men 18-34



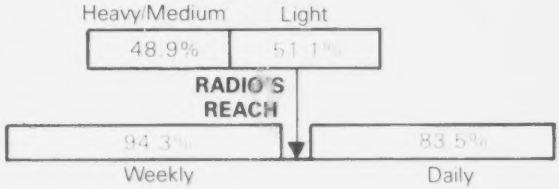
Men 25-54



* GRP's

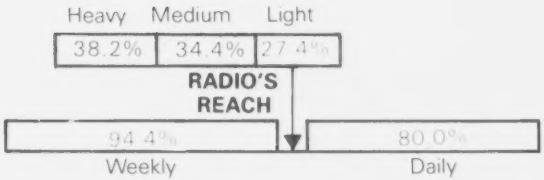
RADIO TARGETS THE LIGHT TV VIEWER

DAYTIME TV
Women 18+



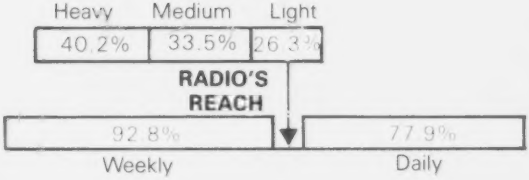
Among those 51.1% of Women 18+ not exposed to daytime Tv on the average weekday:
- **94.3%** listen to Radio in a week
- **83.5%** listen to Radio in a day
- they average **3:59** of Radio listening on the average weekday

AFTERNOON/EVENING TV
Adults 18+



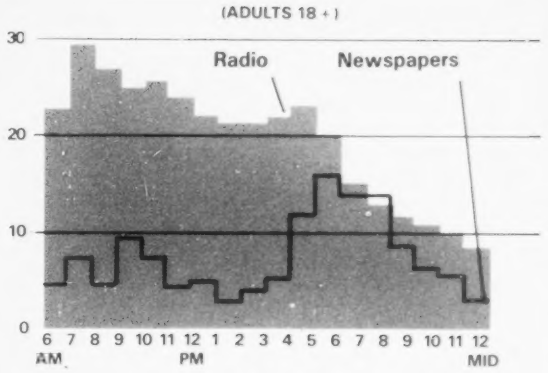
Among those 27.4% of Adults 18+ not exposed to afternoon/evening Tv on the average weekday:
- **94.4%** listen to Radio in a week
- **80.0%** listen to Radio in a day
- they average **3:44** of Radio listening on the average weekday

NIGHTTIME TV
Adults 18+

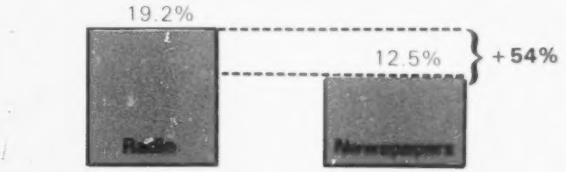


Among those 26.3% of Adults 18+ who either don't watch, or watch 1 hour or less nighttime Tv on the average weekday:
- **92.8%** listen to Radio in a week
- **77.9%** listen to Radio in a day
- they average **3:25** of Radio listening on the average weekday

15.
RADIO-NEWSPAPER COMPARISONS



AVERAGE ALL-DAY RATING:
RADIO 54% AHEAD OF NEWSPAPERS
Adults 18 +, Mon.-Fri., 6AM-Mid.



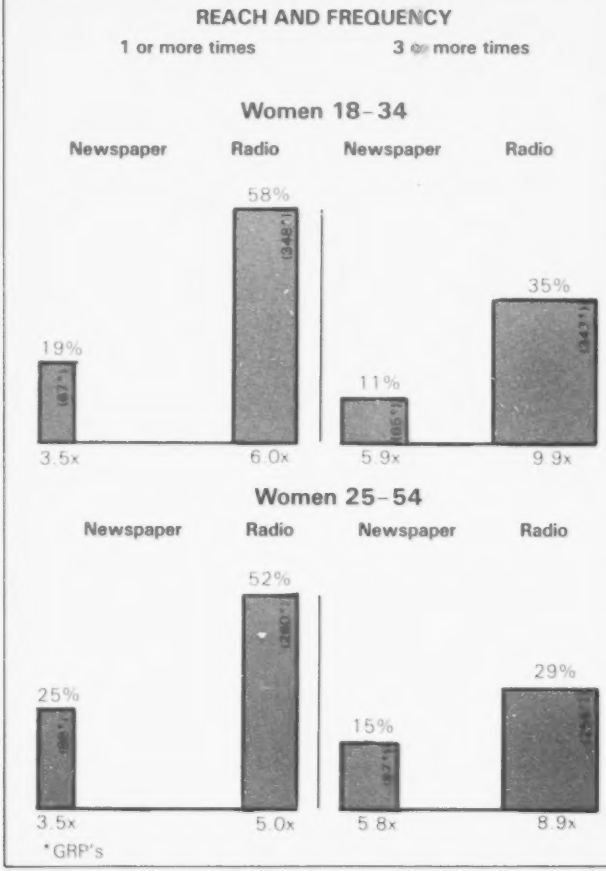
Radio Avg. ¼ Hr., Newspapers Avg. Hr.

AVERAGE DAILY REACH
(Monday-Friday) 1970 vs 1980

	1970	1980	'70-'80 Index
Radio	76.5%	82.1%	107
Newspapers	77.6	66.9	86

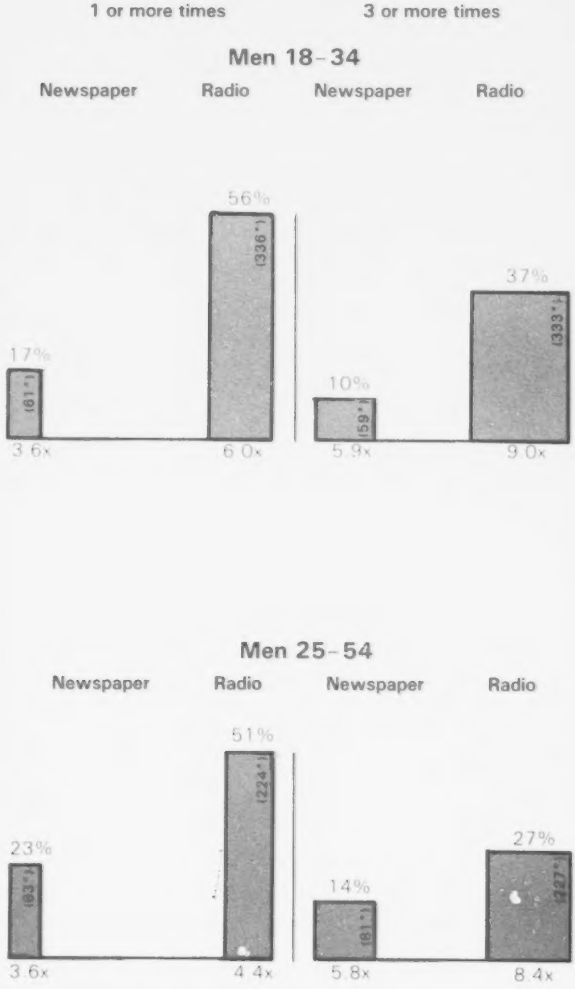
RADIO DELIVERS MORE EFFECTIVE FREQUENCY THAN NEWSPAPERS AT EQUAL BUDGETS

Most media authorities agree that "at least three exposures within a purchase cycle" constitutes effective exposure.



*GRP's

REACH AND FREQUENCY



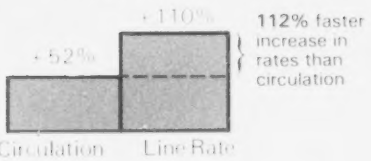
* GRP's

METRO NEWSPAPER CIRCULATION HAS NOT KEPT PACE WITH THE POPULATION . . . WHILE RATES HAVE RISEN

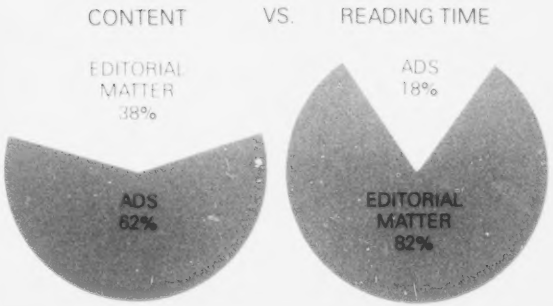
	Percent Change 1979 vs 1970	
	Top 20 Markets	Total U.S.
Households	+ 18%	+ 22%
Population	+ 5%	+ 8%
Circulation	- 5%	0%
Cost-per-thousand	+ 110%	+ 105%
Line rates	+ 100%	+ 105%

WEEKLY NEWSPAPER RATES INCREASING FASTER THAN CIRCULATION

Many weekly papers face problems of rising costs. Consequently, they have raised rates sharply. Rates have increased **112%** faster than circulation since 1970. Here is the national average based on over 7,500 weekly papers.



ADS ARE 62% OF PAPERS BUT GET ONLY 18% OF READING TIME



RADIO—NEWSPAPER DAILY REACH

	Average Daily Reach (Mon.–Fri.)	
	Radio	Newspapers
Sex:		
Men	82%	69%
Women	77	65
Age:		
18–24	84%	59%
25–34	84	62
35–44	84	70
45–54	82	73
18–34	84	61
25–54	83	68
Household Income:		
$35,000+	86%	79%
$25,000+	85	77
$20,000–24,999	83	72
$15,000–19,999	84	68
$10,000–14,999	76	63
Location:		
Cities	79%	69%
Suburbs	79	68
Nonmetro	80	62
Education:		
Coll. grad. or more	85%	78%
1–3 years coll.	84	73
H.S. grad.	81	69
1–3 years H.S.	76	62

FULL-PAGE ADS ARE NOTED BY LESS THAN HALF OF ALL NEWSPAPER READERS

Size of Ad	Size/Cost Index (full page = 100)	Starch "Noted" Readership Scores	
		Men	Women
Full page	100	34%	47%
1/2 page	50	31	35
1/4 page	25	23	30
1/8 page	13	21	27

Note: Advertisers can cut size of ads without proportionate cut in readership and invest budget saved in Radio.

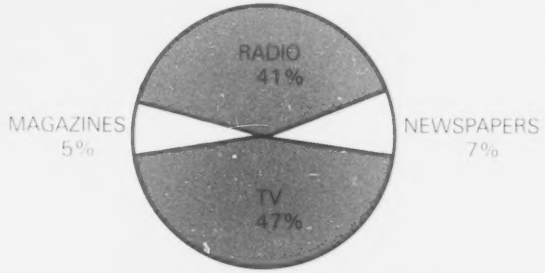
16.

ADULTS SPEND 3 HOURS 27 MINUTES DAILY WITH RADIO

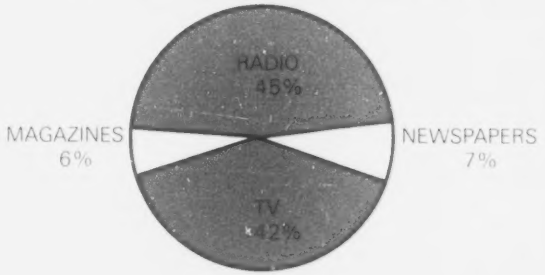
Average Daily Time Spent With Major Media

	Adults 18+	Adults 18-49
Radio	3:27	3:44
Television	3:57	3:28
Newspapers	0:34	0:34
Magazines	0:27	0:27

AVERAGE % DISTRIBUTION OF TIME ADULTS 18+ SPEND WITH 4 MEDIA DAILY



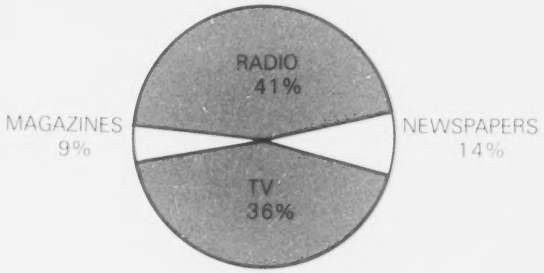
AVERAGE % DISTRIBUTION OF TIME ADULTS 18-49 SPEND WITH 4 MEDIA DAILY



RADIO LEADS OTHER MEDIA IN SHARE OF MIND

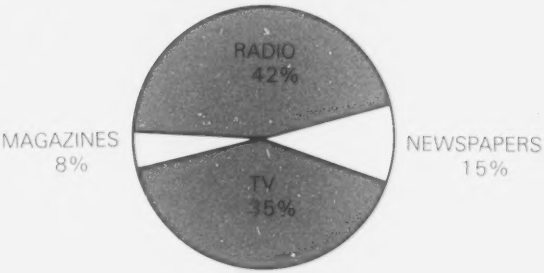
MEDIA SHARE OF MIND
UPSCALE WORKING WOMEN

AVERAGE % DISTRIBUTION OF TIME
WOMEN WITH INCOMES OF $20,000 OR MORE
SPEND WITH 4 MEDIA DAILY.



MEDIA SHARE OF MIND
PROFESSIONAL/MANAGERIAL MEN

AVERAGE % DISTRIBUTION OF TIME
PROFESSIONAL/MANAGERIAL MALES
WITH INCOMES OF $20,000 OR MORE
SPEND WITH 4 MEDIA DAILY

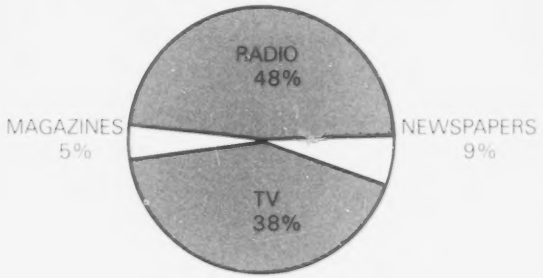


RADIO: MAJOR FORCE WITH YOUNGER CUSTOMERS

High school and college students spend more time with Radio than any other medium.

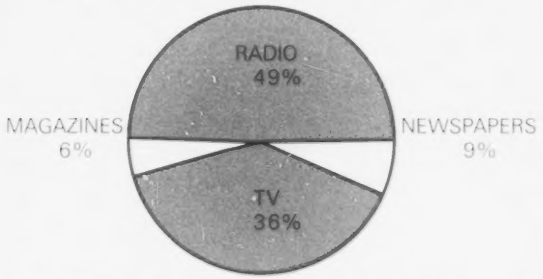
MEDIA SHARE OF MIND

AVERAGE % DISTRIBUTION OF TIME HIGH SCHOOL STUDENTS SPEND WITH 4 MEDIA DAILY



MEDIA SHARE OF MIND

AVERAGE % DISTRIBUTION OF TIME COLLEGE STUDENTS SPEND WITH 4 MEDIA DAILY

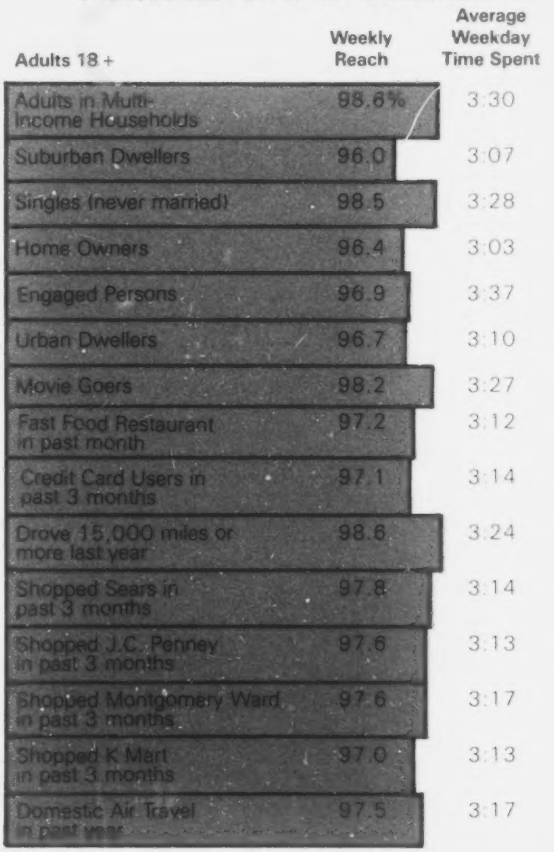


Average Daily Time Spent With Major Media

	High School Students	College Students
Radio	3:30	2:45
Television	2:45	2:00
Newspapers	0:38	0:31
Magazines	0:23	0:21

17.
RADIO'S SELECTIVITY TARGETS ALL MARKET SEGMENTS

RADIO EXPOSURE PATTERN OF
A CROSS-SECTION OF KEY CONSUMERS



PERCENT REACHED BY RADIO AND TIME SPENT LISTENING

Women 18+

	Weekly Reach	Average Weekday Time Spent
Spend $81+ in average week for groceries	96.4%	3:01
Bought blouses/shirts in past year	97.2	3:12
Bought dresses in past year	97.1	3:08
Bought jeans in past year	98.1	3:27
Bought slacks in past year	97.4	3:17
Acquired precious jewelry in past year	98.6	3:30
Home remodeled in past year	97.0	3:11
Bought domestic wine in past month	97.9	3:17
Use perfume once a day or more	97.0	3:20

PERCENT REACHED BY RADIO AND TIME SPENT LISTENING

Men 18+

	Weekly Reach	Average Weekday Time Spent
Bought a suit in past year	98.3%	3:15
Bought dress shirts in past year	98.2	3:22
Bought jeans in past year	98.3	3:38
Rented car in past 6 months	99.1	3:08
Drank domestic beer in past month	97.8	3:20
Own securities	96.6	3:04
Bought new regular radial tires for passenger car last year	98.7	3:19
Responsible for upkeep of car	96.8	3:17
Took business trip in past year (domestic)	98.1	3:19
Use after-shave lotion or cologne once a day or more	97.3	3:18

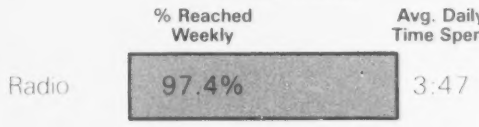
18.

WORKING WOMEN LISTEN 3 HOURS 47 MINUTES A DAY

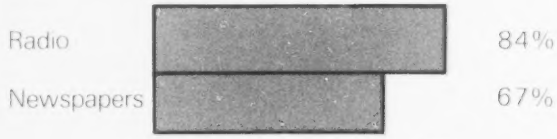
Working women are more affluent and buy more than their nonworking counterparts.

- Some **41.3** million adult women work.
- **62%** of Women 20–64 are in today's labor force.
- Working women are expected to reach **52.2 million** in 1990, an increase of **139%** since 1960.

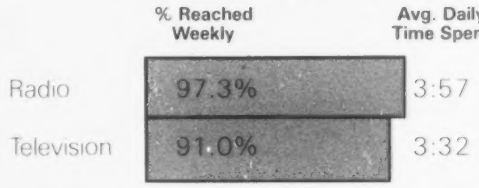
Working Women



RADIO REACHES MORE FULL-TIME WORKING WOMEN THAN NEWSPAPERS ON AN AVERAGE WEEKDAY



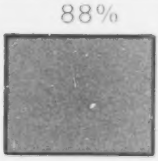
RADIO LEADS TV WITH FULL-TIME WORKING WOMEN



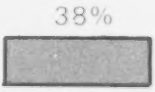
19.
UPSCALE MALES LISTEN 3 HOURS 18 MINUTES A DAY

Professional/Managerial Males represent a large, highly lucrative advertising target audience.

- **24%** of adult men are employed in either professional or managerial white collar occupations.
- **62%** have a household income of $25,000 or more annually.
- **53%** have graduated from college.

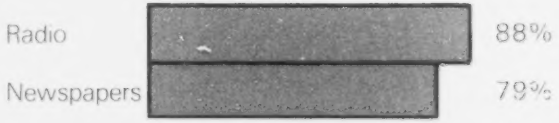


88% of Professional/Managerial Males listen to Radio on an average weekday.

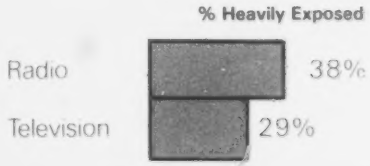


38% of Professional/Managerial Males are heavy Radio listeners.

RADIO REACHES MORE PROFESSIONAL/ MANAGERIAL MALES THAN NEWSPAPERS ON AN AVERAGE WEEKDAY



31% MORE PROFESSIONAL/MANAGERIAL MALES ARE HEAVILY EXPOSED TO RADIO THAN TV



20.

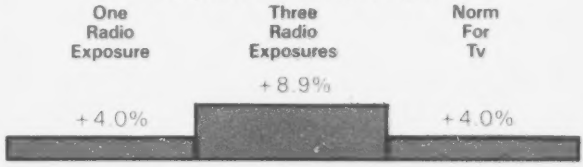
RADIO'S COMMERCIAL RECALL DOCUMENTED IN STUDIES

Copy test scores are used as a gauge of the relative strength of alternative message executions within a medium. These scores are also often interpreted as an index of relative media values across media, provided that the techniques used are similar. Below are six demonstrations that Radio delivers impact levels close to Television. The studies were done using different methods and therefore the norms (averages) are very different. These six studies were done by (1) Schwerin; (2) Gallup & Robinson; (3) Radio Recall Research; (4) Neuro-Communication Laboratories; (5) McCollum/Spielman; and (6) TeleResearch.

(1) THEATER TEST
Schwerin Research Co.

One pretesting survey sponsored by RAB was conducted by Schwerin Research Co. using the same technique that is still being employed by McCollum/Spielman and Audience Studies, Inc. today. Women were asked to a theater on the pretext of previewing a Tv program and were exposed to Television and Radio commercials. One exposure to a Radio commercial was able to improve the "brand share" of a product by 4.0%. This was exactly on target with the Tv norm for one exposure in that product category. Significantly, however, a test of three exposures to a Radio commercial, *which is comparable to the cost of one Tv exposure,* improved the product's brand share by more than twice as much, to 8.9%.

BRAND SHARE CHANGE NET PERCENT DIFFERENCE AFTER EXPOSURE



(2) ON-AIR RECALL MEASURE
Gallup & Robinson, Inc.

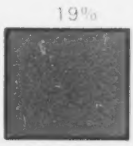
In on-air Radio commercial recall studies conducted by Gallup & Robinson, Inc. among adults 18+, average Radio recall scores proved again to be very close to Tv norms—77% as high as Tv 30" norms. In-car Radio recall provided virtually the same recall as Tv commercials.

RADIO RECALL THREE-QUARTERS THAT OF TV AT CONSIDERABLY LOWER COST

IN-CAR RADIO RECALL EQUIVALENT TO THAT OF TV

(3) SIMULATED ON-AIR RECALL MEASURE
Radio Recall Research

Radio Recall Research has the most extensive Radio copy testing program that RAB is aware of. The technique utilized is 24-hour proven recall. The respondent is exposed the day before, during an interview on leisure activities in which a "radio" was playing in the background. Here are the average results based upon 860 separate tests.

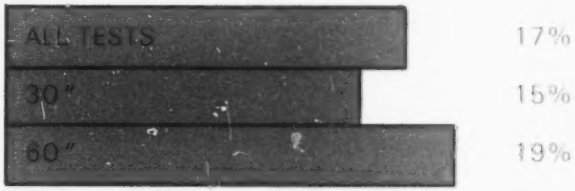


HOW CLOSE IS RADIO TO TV RECALL?

A widely accepted television commercial testing technique produces 24-hour recall norms of about 24% for a 30" commercial. This means that a Radio 60" generates scores that average 79% as high as a television 30" while costing far less.

RADIO RECALL RESEARCH
PROVEN RECALL NORMS

JULY 1977–JUNE 1980



60" RADIO NORMS

(4) BRAIN WAVES TEST
NeuroCommunication Research Laboratories

A recent brain-wave study commissioned by RAB showed Radio commercials scored on a par with Tv commercials for both measures—activation (Beta) and interest (CEP). Beta and CEP were measured in the left brain hemisphere (sequential, logical, intellectual tendencies) and the right brain hemisphere (emotional, creative, intuitive). The Radio scores were within the high evaluation region for brain wave measures.

AVERAGE SCORES FOR PAIRED RADIO/TV COMMERCIALS

	Tv	Radio	Index*
BETA (Activation)	58	61	105
Right	59	61	103
Left	57	61	107
CEP (Interest)	56	56	100
Right	57	54	95
Left	55	58	105

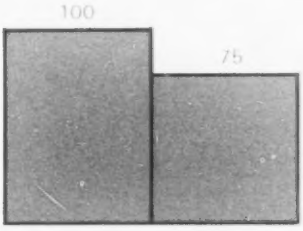
(5) THEATER TEST
McCollum/Spielman & Company, Inc.

Audiences gathered for regular Tv tests provide the sample for this technique. Respondents first hear the test Radio commercial along with a control commercial in a special short Radio show. After a Tv program, the Radio awareness data are collected as well as motivation and attitude measures. Normative data based on 538 tests show that Radio commercials are 83% as effective as television in creating brand awareness.

BRAND AWARENESS SCORES

(6) COUPON REDEMPTION TESTS
TeleResearch, Inc.

Tests are conducted in mobile units at actual supermarkets and drug stores with a control and test sample. Respondents in the test sample are exposed to five commercials for non-competitive products before entering a store to shop. All respondents receive a booklet of cents-off coupons before they enter the store. Performance criteria are developed from a TR Selling Effectiveness score which is a relative index of coupon redeemers from the test and the control sample. On the average TeleResearch has found the rate of product purchase after a 60-second Radio commercial is 75% of that generated by a 30-second Tv commercial.



21.

RADIO: SUPPORT FROM A RANGE OF ADVERTISERS

TOP 15 NATIONAL SPOT RADIO ADVERTISERS – 1979

1. General Motors Corp.
2. Chrysler Corp.
3. Anheuser-Busch, Inc.
4. Ford Motor Co.
5. American Telephone & Telegraph
6. General Foods Corp.
7. Fotomat, Inc.
8. Coca-Cola Co.
9. Delta Airlines
10. Continental Airlines
11. Nissan Motors (Datsun)
12. K Mart Corp.
13. United Airlines
14. Zayre Stores
15. Pepsico, Inc.

TOP 15 NETWORK RADIO ADVERTISERS – 1979

1. General Motors Corp.
2. American Telephone & Telegraph
3. Cotter & Co. (True Value Hardware)
4. Sears Roebuck & Co.
5. Schering-Plough, Inc.
6. General Foods Corp.
7. SmithKline Corp.
8. American Home Products
9. CBS, Inc.
10. Warner-Lambert Co.
11. Sterling Drug
12. Squibb Corp.
13. Morton-Norwich Products
14. Anheuser-Busch, Inc.
15. Jeffrey Martin Inc.

NATIONAL RADIO ADVERTISERS RANKED BY CATEGORY (1979)

Category	Spot	Network	Total
1. Food Products	17.7%	7.7%	14.9%
2. Automotive	14.5	9.3	13.0
3. Travel & Shipping	11.8	1.6	8.9
4. Beer, Ale, Wine	9.9	2.1	7.7
5. Consumer Services	6.6	9.7	7.4
6. Drug Products	2.2	13.2	5.3
7. Cosmetics	2.3	4.6	3.0
8. Apparel	3.3	1.7	2.8
9. Gasoline & Oil	2.6	2.5	2.5
10. Building, Hardware, Paint	1.6	4.1	2.3
11. Agricultural, Garden	3.2	0.1	2.3
12. Confections	1.2	4.9	2.2
13. Publications	1.0	5.2	2.2
14. Soft Drinks	3.0	—	2.1
15. Radio-Tv, Records, Music	2.0	0.7	1.6
16. Amusements	1.6	0.8	1.4
17. Home Furnishings, Appliances	1.0	1.1	1.0
18. Soaps, Cleansers, Detergents	0.5	2.2	1.0
19. Religion	1.3	—	1.0
20. Cigars, Tobacco Products	0.5	—	0.4
21. Pet Products	0.2	0.1	0.1
22. All others	12.0	28.4	16.8

LEADING LOCAL RADIO ADVERTISER CATEGORIES BY MARKET SIZE

		Market Population			
	Total	Over 1 million	250,000-1 million	50,000-249,999	Under 50,000
Auto Dealers	**10.7%**	11.1%	11.2%	10.9%	10.2%
Dept. Stores	**8.4**	9.4	8.6	7.9	8.1
Banks	**8.0**	6.5	6.6	8.3	9.1
Clothing Stores	**7.7**	7.2	7.4	7.6	8.1
Restaurants	**7.0**	6.4	7.7	7.2	6.8
Supermarkets	**6.7**	6.4	6.0	5.3	8.1
Furniture Stores	**6.4**	4.7	6.6	6.2	7.3
Bottlers	**5.9**	6.0	5.5	6.9	4.9
Appliance Stores	**4.9**	3.5	5.2	5.0	5.2
Savings & Loans	**4.2**	5.0	3.6	4.4	3.9
Shopping Centers	**3.3**	4.2	3.6	3.8	2.4
Jewelers	**3.3**	3.2	3.1	3.6	3.3
Theaters	**3.3**	6.7	4.1	3.1	1.4
Lumber Dealers	**2.8**	1.0	1.9	3.0	4.0
TBA Stores	**2.8**	2.9	3.3	2.6	2.6
Drug Stores	**2.5**	2.2	1.6	2.3	3.4
Shoe Stores	**2.0**	1.2	1.8	2.1	2.3
Entertainment	**1.7**	2.6	2.5	1.8	0.7
Agricultural	**1.3**	0.1	0.7	1.6	1.9
Stereo/Record Stores	**1.2**	2.8	2.0	1.0	0.2
Other Financial	**1.2**	1.5	1.0	1.1	1.1
Religion	**0.6**	0.2	1.3	0.7	0.3
Real Estate	**0.5**	0.8	0.2	0.6	0.5
Other	**3.6**	4.4	3.5	3.0	4.2

22.

RADIO'S REVENUES AT BETTER THAN $3.5 BILLION

RADIO REVENUES
(IN MILLIONS OF DOLLARS)

Year	Spot	Local	Network	Total
1960	$208.0	$ 401.6	$ 44.9	$ 654.5
1961	205.6	397.7	47.7	651.0
1962	218.2	434.2	44.9	697.3
1963	231.0	465.0	51.5	747.6
1964	244.1	504.2	54.0	802.3
1965	261.3	553.0	54.3	868.7
1966	292.6	607.6	57.4	957.7
1967	298.3	641.2	58.2	997.6
1968	342.2	733.4	54.7	1,130.4
1969	349.6	799.9	50.9	1,200.4
1970	355.3	852.7	48.8	1,256.8
1971	378.0	954.6	55.1	1,387.7
1972	384.3	1,098.4	65.0	1,547.7
1973	382.3	1,205.4	59.4	1,647.1
1974	386.8	1,308.8	60.3	1,755.9
1975	416.3	1,403.3	72.7	1,892.3
1976	494.6	1,639.3	92.2	2,226.1
1977	521.3	1,873.1	118.1	2,512.5
1978	589.7	2,179.2	126.4	2,895.3
1979	637.3	2,396.6	138.5	3,172.4
1980*	764.9	2,601.4	167.3	3,533.6

* Estimated

SOURCE APPENDIX

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2 Set Count and Set Sales data from Electronic Industries Association (EIA) and RAB Research Dep't.*

2 1980 expenditures on radio sets—RAB estimates based on EIA, Merchandising Magazine Research Dep't., Automotive News Almanac.

2 1961-70 and 1971-80 set sales—EIA.

3 Radio Set Sales Mix—RAB calculations based on EIA.

3 Commercial Stations On The Air-FCC, Dec. 31st of each year.

4 Radio households—1960: Nielsen; 1970: RAB estimate based on R.H. Bruskin study, 1962, updated to 1970 Census Bureau household count; 1981: RADAR, based on Census Bureau estimate of household count.**

4 Average household has 5.5 sets—RADAR, 1980 (special tabulation).

4 77% of persons have 4 or more sets—RADAR, 1980 (special tabulation).

5 Where Home Radios Are Located—RADAR, 1980; projected to total set counts in home.

5 Battery Set Sales—EIA.

6 Radio Sets In Autos—RAB estimates based on auto registrations from U.S. Dep't. of Transportation, SRDS, and Automotive News.

6 98% of Company Owned Cars—Nat'l. Ass'n. of Fleet Administrators survey, 1978.

6 99% of Used Cars—Hertz Corp., 1979 survey of buyers.

6 Automobiles in Constant Use—86% of commuters: U.S. Census Bureau, 1975; 90% of shopping visits: Response Analysis Corp., 1974; 84% of intercity travel: U.S. Census of Transportation, 1977.

6 Auto Radio reaches 7 out of 10—RADAR, Fall 1980 report.

7 Radio's Cumulative Audience Reach, by place of listening—RADAR, Fall 1980 report (Mon.-Sun., 24 hours).

8 Radio's Cumulative Audience Among A Range of Demographic Groups—RADAR, Fall 1980 report. Average daily time spent—RAB estimates based on RADAR, Fall 1980 report.

9 Radio's Weekend Reach, Time Spent Listening—RADAR, Fall 1980 report. Weekend Reach by Season—Arbitron, average of 9 markets measured four times a year, metro survey areas, persons 12+, 6 A.M.-Midnight, 1980.

10 7 P.M.-Midnight—RADAR, Fall 1980 report.

11 Midnight-6 A.M.—RADAR, Fall 1980 report.

12 Summer Radio: Arbitron, average of 9 markets, July-August, 1980, metro survey areas. Reach, time spent listening based on Monday-Sunday. Shares by location and daypart based on Monday-Friday.

13 Radio Audience by Season—Arbitron, average of 9 markets measured 4 times a year, metro survey areas, 1980, Monday-Sunday, 6 A.M.-Midnight. TV 11%: Summer decline—Nielsen National Audience Demographic Report from TvB, 1980.

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14 Radio Delivers The News First: ORC Caravan survey, July 1975, for CBS Radio.

14 Radio Is Primary Daytime News Source: R.H. Bruskin Associates, December 1972, for CBS Radio.

14 Radio Tops Other Major Media: Trendex, July 1977, New York area survey.

16 Radio Leads Other Daily Media in Daily Weekly Reach: Radio: RADAR, Fall 1980 report. TV: Special Nielsen National Television survey, 1977. Newspapers: Simmons Market Research Bureau, 1980 fall adult. 18+. Radio-TV / day, Newspaper based on 5 day.

16 Radio's Audience Growth: RADAR, 1967 through 1980. RADAR 1967 through 1974 were done in the Spring; 1975 to 1980 done in Spring and Fall; figures used are combined reports.

17 Media Cost Per Thousand Indices: McCann-Erickson, Inc. Network and Spot Radio, TV averaged by RAB Research Dept.

18 Radio Leads TV Through Daytime: Radio: RADAR, Fall 1980 report. Hourly averages based on avg. quarter hours within each hour. TV: Nielsen, average of Feb. March and Oct. 1980 NAD reports from TvB. Hourly avg. based on avg. half hours within each hour.

19 Radio Delivers For More Effective Frequency: The Relationship Between Frequency and Advertising Effectiveness, by Michael J. Naples. Average of schedules in 5 markets. Radio budgets (equal to TV) were set at typical retailer's weekly TV expenditure in each market over four weeks, using published rates. Audience data: average of two Arbitron surveys - Radio: Oct.-Nov. 1979 and April-May, 1980. TV: Nov. 1979 and May, 1980.

21 Radio Targets The Light TV Viewer: RADAR, Fall 1980 report.

22 Radio 64% Ahead of Newspapers: Newspapers: Newspaper Readership Project, March 1977, conducted by Audits & Surveys, for Newspaper Advertising Bureau. Radio: RADAR, Fall 1980 report.

22 Average Daily Reach: 1980 vs. 1970: Radio: Fall 1980 and Spring 1970 RADAR reports. Newspapers: Simmons Market Research Bureau 1980 and 1970 reports.

23 Radio Delivers For More Effective Frequency: Average of schedules in 5 markets. Radio budgets (equal to Newspapers) were set at cost of a weekday half page ad once a week for four weeks in the largest circulation newspaper in each market. Audience data: Radio: average of Oct.-Nov. 1979 and April-May, 1980 Arbitron. Newspapers: Readership data from *Local Newspaper Audiences*, Seventh Edition, March 1979. Circulation (for papers without reported readership data from *Circulation 80*, 81, plus Simmons national readers per copy data). Starch INRA Hooper noted scores for ½ page ad were applied.

25 Metro Newspaper Circulation Has Not Kept Pace: Households and Population: Sales & Marketing Management Survey of Buying Power, 1980 vs. 1971. Circulation: ABC, Sept. 30, 1979 vs. Sept. 30, 1970. Line Rates: SRDS, Dec. 1979 vs. Dec. 1970.

25 Weekly Newspaper Rates: National Directory of Weekly Newspapers, 1980 vs. 1970.

25 Ads are 62% of Content But Get Only 18% of Reading Time: CBS five market study, 1971.

26 Radio Newspaper Daily Reach: Simmons Market Research Bureau, 1980.

26 Full Page Ads: Starch INRA Hooper, Avg. of 46 newspaper surveys, 1970-78.

27 Media Share of Mind - Adults 18+, 18-49: Radio: RADAR, Fall 1980 report. TV: Nielsen Audience Demographics Report, avg. of March-May, July-Nov. 1980 from TvB. Newspapers and Magazines: Ted Bates Instant Media Facts, 1978-79.

28 Upscale, Working Women, Professional Managerial Males: The Media Book, 1978 (published by Media Industry Newsletter).

29 High School and College Students: Gilbert Youth Research, 1975.

30 Radio's Selectivity - Adults 18+: Simmons Market Research Bureau, 1980.

31 Percent Reached by Radio and Time Spent Listening Daily: Simmons Market Research Bureau, 1980.

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32 Working Women--size (of market)--U.S. Dep't. of Labor, 1980. Percent Listening Weekly: RADAR, Fall 1980 report. Daily Time Spent: RAB estimate based on RADAR, Fall 1980 report. Radio Newspaper comparison--Simmons Market Research Bureau, 1980.

32 Radio TV comparison: Radio: RADAR, Fall 1980 report. TV: Nielsen, 1977 (weekly reach). Nielsen Audience Demographics Report, avg. of March May July Nov. 1980 from TvB (time spent viewing).

33 Professional Managerial Males--Simmons Market Research Bureau, 1980.

34 Theater Test--Schwerin: Schwerin Research Corp., April-May 1969.

35 On Air Recall Measure--Gallup & Robinson, Inc., May 1973.

35 Simulated On Air Recall Measure: Radio Recall Research, July 1977-June 1980.

36 Proven Recall Norms: Radio Recall Research, July 1977-June 1980.

36 Brain Waves Test: NeuroCommunication Research Laboratories, 1979.

37 Theater Test-McCollum/Spielman & Company, Inc., through March 1981.

37 Coupon Redemption Tests--TeleResearch, Inc., 1978.

38 Top National Spot Radio Advertisers: RER, 1979. Network: RER/BAR, 1979.

39 Categories: Spot: RER 1979. Network: RER/BAR, 1979. Total combined by RAB Research Dep't.

40 Categories: Local: RAB, 1980 (survey of RAB membership).

41 Radio Revenues: 1960-79-FCC, 1980-RAB estimate.

* All set status figures as of Jan. 1, each year.

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